

HOW TO USE THE ENHANCED GEOGRAPHICAL FIELDS IN THE ONLINE PROJECT PLANNING SYSTEM [OPS](#)

This guidance provides:

- ◆ instructions for organizations uploading draft projects onto OPS about how to enter geographical details for their projects
- ◆ instructions for cluster coordinators about how to use the geographical detail for cluster analysis and project vetting

SUMMARY:

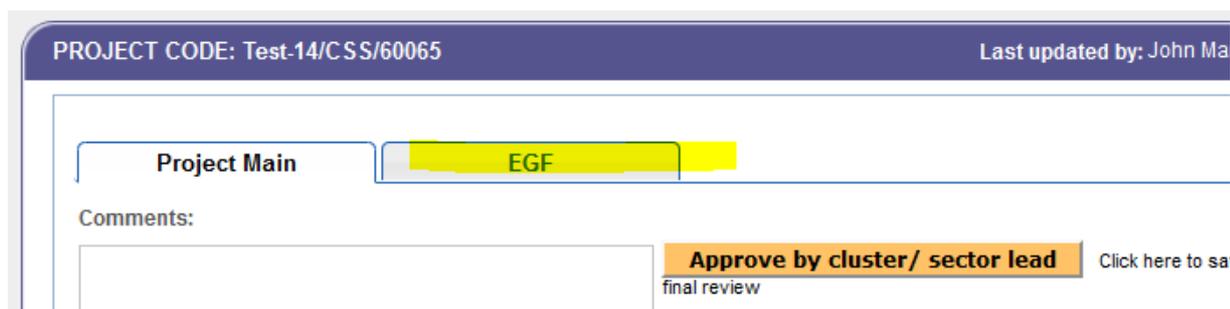
OPS' enhanced geographical fields (EGF) allow organizations to record their project(s)'s locations in detail, including multiple locations, and multiple administrative levels (e.g. province – district – commune). These details are crucial in planning efficient coverage of humanitarian needs, avoiding duplications, and minimizing gaps. The locations will appear as drop-down menus tailored for each country. The menus will contain the standard location names and P-codes (place codes) used by each country's humanitarian information managers.

After agreement in the cluster about the geographical division of labour (i.e. who will cover which needs where) organizations uploading draft projects on OPS should indicate each of the locations where that project proposes to operate. This information becomes part of the electronic project sheet on OPS and is published electronically on OCHA's Financial Tracking Service (fts.unocha.org) page for each country.

Cluster coordinators will ensure that each draft project on OPS has full geographical detail, and that this corresponds with the division of labour agreed within the cluster. (Cluster coordinators should not click "approve" on any project that has not recorded geographical details; it may be difficult to add them later.) Coordinators then review the project locations in an Excel spreadsheet format (which OPS automatically provides), so that they can spot any gaps or duplications and modify the projects to correct these before submitting them to the Humanitarian Coordinator for final review.

1) FOR ORGANIZATIONS UPLOADING DRAFT PROJECTS ONTO OPS

STEP 1: Upload all mandatory project data and click on "save and stay". (For technical reasons, the system will not activate the EGF function until the other mandatory data fields are filled out and saved.)



The screenshot shows the OPS interface for a project with code 'Test-14/CSS/60065', last updated by John Ma. At the top, there are two tabs: 'Project Main' and 'EGF'. The 'EGF' tab is highlighted in yellow. Below the tabs is a 'Comments:' field. To the right of the comments field is an orange button labeled 'Approve by cluster/ sector lead' and a link that says 'Click here to save for final review'.

STEP 2: Identify the EGF tab (here highlighted in yellow) next to the Project Main tab, at the top of the page. Click on it.

STEP 3: OPS then opens a window that presents (under a summary of your project) a set of pre-filled drop-down menus containing the locations related to your appeal (grouped into the geographical administrative levels). Select each location where your project will operate. Do this by first choosing the highest administrative level, then one of the next, then one of the next, etc. Click "add" after each selection. The drop-down menus for the

lower levels are automatically filtered depending on your selection of the previous level—i.e. if you select a province, the next drop-down menu will contain district names for that province only.

Note that if the project covers the entire area of a particular administrative level (e.g. a whole province), there is no need to select all the parts (e.g. districts) of a province **select the province and no lower administrative levels, and it will be understood that the project covers the whole province** (see examples below).

When you click “add”, the information will be displayed in the box to the right. (Click on the red X to remove a location if entered by mistake or in a later revision.)

The information will be displayed on the PDF version of the project sheet (click on the PDF/Word icon at the top of the online project form). It will also appear in Excel format with all other draft projects via a link on the Project Summary Tables page on OPS.

Here are a few examples of how to upload EGFs for a country with two administrative levels (“states” and “counties”).

Example 1: Project A proposes activities covering all the counties (admin 2) in Jonglei state (admin level 1). Thus, you would only need to select “Jonglei,” as that indicates that the project will cover all the counties as well.

Note: It would be incorrect to select Jonglei state AND then to select each of Jonglei’s six counties if your project will cover all six counties.

Example 2: Project B is working in three of the six counties of Lakes state. Hence, you would need to select Lakes for the first admin level and then the three target counties, clicking “add” after selecting each county. The result would be displayed like this:

Project Main | EGF

Enhanced Geographical Field (Please select from the highest to the lowest administrative/geographical fields)
If the project covers the entire area of a particular administrative level (e.g. a whole province), there is no need to select all the parts (e.g. districts) of a province - just select the province and no lower administrative levels, and it will be understood that the project covers the whole province.
[Click here to download the Enhanced Geographical Fields User Guide](#)

Locations : Lakes Wulu

Lakes - Rumbek Centre	all areas of this admin level
Lakes - Rumbek East	all areas of this admin level
Lakes - Wulu	all areas of this admin level

click on **X** to delete your selection

Note: To view the complete list of your locations, click on the above PDF/Word icon or go back to the full project screen after clicking SAVE

Example 3: “Project C” is working in three of the 3 counties in the Montagnes state and in all of the counties of Agneby state. Hence, you would need to select and click “add” for the three Montanges counties as in the previous example, plus select Agneby state and click “add” without selecting departments:

Enhanced Geographical Field (Please select from the highest to the lowest administrative/geographical fields)

Locations : Agneby Select Departments

Montagnes - Bangolo	
Montagnes - Biankouma	
Montagnes - Danane	
Agneby	

click on **X** to delete your selection

Note: To view the complete list of your locations, click on the above PDF/Word icon or go back to the full project screen after clicking SAVE

Note: As in Example 1, it is not necessary to select any of the departments of Agneby, because the selection of the Agneby state alone (admin level 1) implies the inclusion of all counties (admin level 2). Just select Agneby from the first drop-down menu, and click “add.”

Note on “old” project location field on OPS (see screenshot below): these will be de-activated for most appeals, since they contain the same information as the EGF’s admin level 1. You should leave it blank and go to the EGFs instead (after saving the project). But there will be a few SRPs’ that will keep this old location field in use, for areas or groupings that do not correspond to official place names and admin levels but which are useful for coordination (like “north,” “border areas” and “refugee camps”). If this field is to be kept in use for your appeal, the OCHA appeal manager will inform all organizations. In these cases, you should fill out both the old location field and the details in the EGFs.

Original sub total: 0

Original sub total: 50

Funds Requested : Total Original Funds **50 US\$**

FTS Contributions : [View contributions recorded on Financial Tracking Service - FTS]

Classification:

Cluster/Sector* : COORDINATION AND SUPPORT SERVICES

Project location (Province, Regions etc.) : NOT SPECIFIED

Objective* : NOT SPECIFIED

Multiple provinces

province A

province B

Province C

Beneficiaries* : Type Number (like 500000 or -500000 without commas) Beneficiaries Description

TOTAL: test

2) CLUSTER ANALYSIS USING EXCEL DATA

The EGF Excel (downloaded via a link on the Project Summary Tables page on OPS) displays the detailed geographical locations of each project, with pre-set filtering options that allow users to easily view who is planning to do what and where. In reviewing project proposals during the preparation or revision of a strategic response plan, cluster coordinators should use this new tool to ensure that their cluster's proposed appeal projects are meeting the assessed priority needs in the identified geographical areas without gaps or duplications.

Note that the Excel splits each project into multiple rows—one row for each location that is recorded for that project. This allows the cluster coordinator to tell at a glance (using the Excel auto-filter) which projects plan to operate in each location. Also, because of this splitting of each project into multiple rows, the funding requirements are not displayed on this Excel – because the splitting would repeat the budget on each row, which would inflate the column total.

Note: when the Excel downloads, you may get a dialogue box asking whether to enable or disable the macros. Choose “enable.”

Screenshot of example showing one project split into multiple rows, one per location

	A	B	C	D	E	F	G
	Cluster	Region	Governorate	Community	Organisati	Project Co	Project title
1	AGRICULTURE	West Bank	Ramallah	Ein Samiya	ACF	OPT-12/A/43359	Emergency support to protect livestock-based livelihoods in the most vulnerable communities in
2	AGRICULTURE	West Bank	Ramallah	Muarrajat Centre	ACF	OPT-12/A/43359	Emergency support to protect livestock-based livelihoods in the most vulnerable communities in
3	AGRICULTURE	West Bank	Ramallah	Muarrajaat	ACF	OPT-12/A/43359	Emergency support to protect livestock-based livelihoods in the most vulnerable communities in
4	AGRICULTURE	West Bank	Ramallah	Muarrajat East	ACF	OPT-12/A/43359	Emergency support to protect livestock-based livelihoods in the most vulnerable communities in
5	AGRICULTURE	West Bank	Ramallah	Muarrajat East	ACF	OPT-12/A/43359	Emergency support to protect livestock-based livelihoods in the most vulnerable communities in

Here are some practical examples of how to use the Excel for cluster analysis and project vetting.

Example 1: The cluster coordinator of Agriculture in OPT wants to see which projects are being proposed for the governorate (admin level 2) of Ramallah, in the West Bank (admin level 1), to ensure that the proposed projects (or parts of projects) will cover the priority needs identified in assessments.

1) Go to column A (cluster) and select Agriculture.

2) Go to column B (region, i.e. admin level one), click the auto-filter arrow in the region column, and select “custom” from the auto-filter drop-down menu. ** Choose region equals “West Bank” and governate “All areas of this admin level.” (You must select both “West Bank” and “All areas of this admin level” because, as mentioned above, if a project covers an entire admin level, the proposing organization does not select further detail from the lower admin levels. It is understood that this means that the project will work in all parts of the selected admin level. In theory, each project should indicate locations on at least admin level 1, even if it covers the whole country; but in practice, some may not, in which case OPS shows “All areas...” as a default. So the cluster coordinator should consider those projects’ geographical extent in this kind of analysis, by setting the auto-filter to the region of interest plus “All areas of this admin level.”)

	A	B	C	D	
1	Cluster	Region	Governorate	Community	Organ
63	AGRICULTURE	Sort Ascending Sort Descending	all areas of this admin level	all areas of this admin level	ACS
64	AGRICULTURE	(All) (Top 10...)	all areas of this admin level	all areas of this admin level	ACS
65	AGRICULTURE	(Custom...) all areas of this admin level Gaza Strip West Bank	all areas of this admin level	all areas of this admin level	ACTED
83	AGRICULTURE	all areas of this admin level	all areas of this admin level	all areas of this admin level	CARE International

Custom AutoFilter

Show rows where:

Region

equals West Bank

And Or

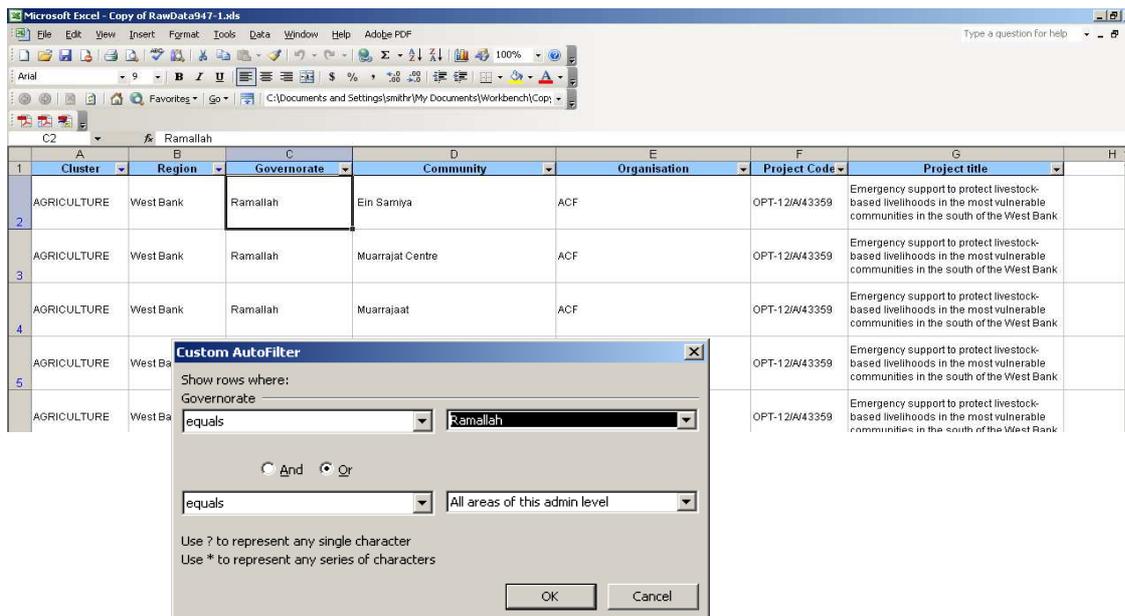
equals all areas of this admin level

Use ? to represent any single character
Use * to represent any series of characters

OK Cancel

3) Click the auto-filter arrow in the governorate column, and select “custom” from the auto-filter drop-down menu. Choose governorate equals Ramallah, tick the box “or”, and then choose equals “All areas of this admin level.” (Again, you must select both “Ramallah” and “All areas...” because, as mentioned above, if a project covers an entire admin level, the proposing organization does not select further detail from the lower admin levels. It is understood that this means that the project will work in all areas of the selected admin level.)

** Excel 2007 and 2010 give the user the same option for multiple choices of the auto-filter, but with a check-list format.



4) This will leave (in the OPT example) about 30 rows on the Excel sheet. (Note that this does not indicate 30 unique projects, as projects that propose to cover more than one location in Ramallah would be repeated several times on separate rows.) The cluster coordinator can now compare these projects to the assessed needs in Ramallah and estimate whether they will be sufficient or whether they overlap with each other:

- If the beneficiary numbers of all the projects proposed for Ramallah do not amount to the number of people in need, then you have identified a gap, and you should encourage other cluster members to help cover the needs in Ramallah, or encourage those already planning to cover Ramallah to increase their beneficiaries.
- If the projects appear to overlap, you can get an idea of the projects' activities from their titles on the spreadsheet. For more detail, consult the project's full OPS sheet, to get beneficiary numbers and exact activities. Projects that seem to overlap may actually be targeting the same beneficiaries with different activities (e.g. seeds and tools distributions vs. livestock vaccination). However, if the activities and beneficiaries do actually overlap, discuss with the concerned organizations to agree on who will cancel which parts of their projects to remove the overlap.

The screenshot shows an Excel spreadsheet with the following data rows visible:

1	Cluster	Region	Governorate	Community	Organisation	Project Code	Project title
2	AGRICULTURE	West Bank	Ramallah	Aj Janiya	SCC	OPT-12/A/43771	Humanitarian agricultural support for poor people in marginalized communities (mainly in area C and Seam zone) in Qalqilya, Salfit, Nablus, Ramallah, Bethlehem and Hebron Governorates
3	AGRICULTURE	West Bank	Ramallah	Al Mughayyir	OXFAM Solidarite	OPT-12/A/43690	Improve household food security of vulnerable farmers' families in Ramallah district.
4	AGRICULTURE	West Bank	Ramallah	Al Tira	SCC	OPT-12/A/43771	Humanitarian agricultural support for poor people in marginalized communities (mainly in area C and Seam zone) in Qalqilya, Salfit, Nablus, Ramallah, Bethlehem and Hebron Governorates
5	AGRICULTURE	West Bank	Ramallah	Beit Liqya	SCC	OPT-12/A/43771	Humanitarian agricultural support for poor people in marginalized communities (mainly in area C and Seam zone) in Qalqilya, Salfit, Nablus, Ramallah, Bethlehem and Hebron Governorates
6	AGRICULTURE	West Bank	Ramallah	Beit Sira	SCC	OPT-12/A/43771	Humanitarian agricultural support for poor people in marginalized communities (mainly in area C and Seam zone) in Qalqilya, Salfit, Nablus, Ramallah, Bethlehem and Hebron Governorates
63	AGRICULTURE	West Bank	Ramallah	Beit Ur al Fauqa	OXFAM Solidarite	OPT-12/A/43690	Improve household food security of vulnerable farmers' families in Ramallah

5) To be thorough, you should check for gaps and duplications at the lowest admin level (“Community” in this OPT example). Just repeat the filtering process in the “Community” column (after following steps 1-3 of this section), setting the custom auto-filter to the community of interest (“At Tira” in this screenshot) plus “All areas...”

	A	B	C	D	E	F
1	Cluster	Region	Governorate	Community	Organisation	Project Code
196	AGRICULTURE	West Bank	Ramallah	At Tira	SCC	OPT-12/A/43771
220	AGRICULTURE	West Bank	Ramallah	all areas of this admin level	UAWC	OPT-12/A/43703
387	CASE				UNRWA	OPT-12/ER/43732
398	CASE				UNRWA	OPT-12/ER/43743
440	COO AND SEP				OCHA	OPT-12/CSS/43839
450	COO AND SEP				UNRWA	OPT-12/CSS/43572
466	EDU				JUHOUD	OPT-12/E/43328
523	FOOD SECURITY	West Bank	Ramallah	all areas of this admin level	UNRWA	OPT-12/F/43746

Custom AutoFilter

Show rows where:

Community

equals

And Or

equals

Use ? to represent any single character
Use * to represent any series of characters

OK Cancel

If there are many communities (or whatever admin level 2 denomination is relevant), instead of filtering them one by one you can just sort the spreadsheet by the “Community” column, and scroll down to see if there are multiple projects in any community. Either way, you will probably have to get more detail from the organizations whose projects cover “All areas of this admin level.”

5) To check activities and beneficiary numbers of each project to confirm sufficiency or overlap, go to the Project Summary Tables page on OPS and click on the “Full printout of all projects” link. You can then search the PDF or Word document for any project by putting its project code in the search bar (Ctrl + F). (You can just enter the five-digit sequence, not the entire code.)

Internet Explorer
 a.org/pageloader.aspx?page=projectssummary&appealId=947
 ols Help

Refresh summary overview

Project Status	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl. pending approval) US\$
Draft	198	482,390,014	0	0

Cluster/Sector	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl. pending approval) US\$
AGRICULTURE	36	39,449,692	0	0
CASH FOR WORK	13	101,061,937	0	0
COORDINATION AND SUPPORT SERVICES	6	19,009,966	0	0
EDUCATION	17	18,906,209	0	0
FOOD SECURITY	8	178,825,235	0	0
HEALTH AND NUTRITION	42	36,470,382	0	0
PROTECTION	38	43,384,932	0	0
WATER, SANITATION AND HYGIENE	38	45,281,661	0	0

Organisation	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl. pending approval) US\$

Summary tables

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project location
- per priority
- per Gender Marker

Detailed project list:

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project location
- per priority
- per Gender Marker

Full printout of all projects

Grouped By cluster/sector

Download all project data in spreadsheet format

Download Enhanced Geographical Fields in excel format

New for this year is the introduction of the highlighted pink cells. Having the old location data transferred to the EGF file, makes it easy to see if the some location data exists. This was not the case in the past; you then had to compare two different excel files to see this information.

	A	B	C	D	E	F	G	H
	Cluster	Region	Prefecture	Sub-Prefecture	Commune	Organisation	Project Code	Project title
42	EARLY RECOVERY	Region des Kagas	Ouaka	Bambari	Bambari	JUPEDEC	CAF-13/ER/59291/R	Support in the socio economic reintegration of victims of crisis Bambari and Alindao
43	EARLY RECOVERY	Region du Haut-Oubangui	Basse Kotto	Alindao	Alindao	JUPEDEC	CAF-13/ER/59291/R	Support in the socio economic reintegration of victims of crisis Bambari and Alindao
44	EARLY RECOVERY	OLD LOCATION: Vakaga	OLD LOCATION: Vakaga	OLD LOCATION: Vakaga	OLD LOCATION: Vakaga	NDA	CAF-13/ER/59792/R	Capacity development of community based organisations in Ouandja, Vakaga, prefecture
45	EARLY RECOVERY	OLD LOCATION: Basse Kotto	REMOD	CAF-13/ER/57901/R	Projet de mise en place d'un atelier de fabrication de savon artisanal à Alindao (Sous-préfecture d'Alindao), Basse Kotto			
46	EARLY RECOVERY	Region des Kagas	Nana Gribizi	All areas of this admin level	All areas of this admin level	Solidarités	CAF-13/ER/55577	Supporting economic recovery in Nana-Gribizi Prefecture through capacity building of agricultural federations, community based farmers' organizations and a national NGO
47	EARLY RECOVERY	OLD LOCATION: Multiple locations	UNDP	CAF-13/ER/59275/R	REMASTP recovery as well as its national antenna for the restart of communication on prevention HIV/AIDS, Tuberculosis and Malaria			
48	EARLY RECOVERY	Region du Bas-Oubangui	All areas of this admin level	All areas of this admin level	All areas of this admin level	UNOPS	CAF-13/ER/55712/R	Improvement project of security sector in Bangui city
49	EARLY RECOVERY	Region des Plateaux	Ombella M'Poko	All areas of this admin level	All areas of this admin level	UNOPS	CAF-13/ER/55712/R	Improvement project of security sector in Bangui city
50	EARLY RECOVERY	Region du Ferit	Haute Kotto	Yalinga	All areas of this admin level	VITALITE PLUS	CAF-13/ER/57953/R	Support income generating activities for women associations and intern displaced people in Haute Kotto.
51	EARLY RECOVERY	Region du Ferit	Haute Kotto	Bria	Daba-Nydou	VITALITE PLUS	CAF-13/ER/57953/R	Support income generating activities for women associations and intern displaced people in Haute Kotto.
52	EARLY RECOVERY	Region du Ferit	Haute Kotto	Bria	Daho-Mboutou	VITALITE PLUS	CAF-13/ER/57953/R	Support income generating activities for women associations and intern displaced people in Haute Kotto.

